

PostalOne! Release 40

January 2015

Full-Service

1/21/2015

Agenda

→ Full-Service Initiative Background

- Mailer Scorecard Electronic Verification Tab Updates
 - Full-Service Total Additional Postage Due Display
 - Full-Service Postage Assessments
 - Move Update Changes
 - eDoc Nesting/Sorting Validation
- Full-Service Cumulative Percent Display
- Full-Service and Fee Renewals
- Service Performance Measurement (SPM) on the Mailer Scorecard

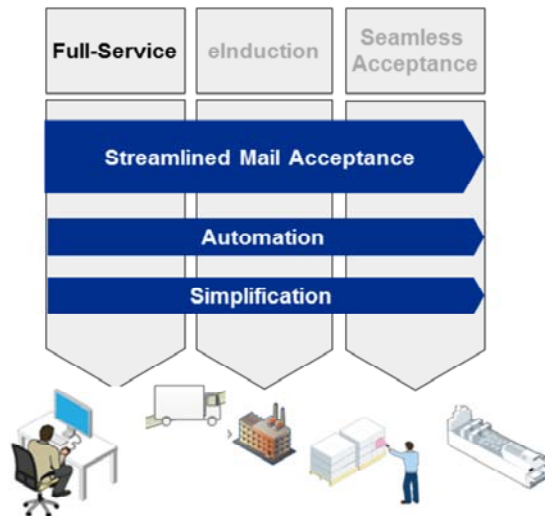
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Welcome to the Full-Service module of the January 2015 *PostalOne!* Release training. This module will cover a background on Full-Service, updates to the Mailer Scorecard, and enhancements related to Full-Service cumulative percent display and fee renewals.

Let's begin with some background on the Full-Service Intelligent Mail Program.

Full-Service Initiative Background

The future of mail is now



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The Postal Service is undergoing key initiatives to streamline the acceptance, induction, and verification of commercial mailings with the implementation of Full-Service Intelligent Mail®, eInduction, and Seamless Acceptance programs. These programs leverage existing processes and systems to enable end-to-end visibility and reporting on mail as it travels through the mail stream.

Full-Service Initiative Background

Full-Service Benefits

- Reduce Costs
 - Receive additional per piece discount on automation mailings
 - Eliminate annual permit fees
 - Use same permit at any location (Mail Anywhere)
- Accurate Delivery
 - Free Address Correction on Full-Service pieces
- Monitor Service
 - Start-the Clock on Mail Entry
 - Visibility and Tracking

Full-Service Mail Options

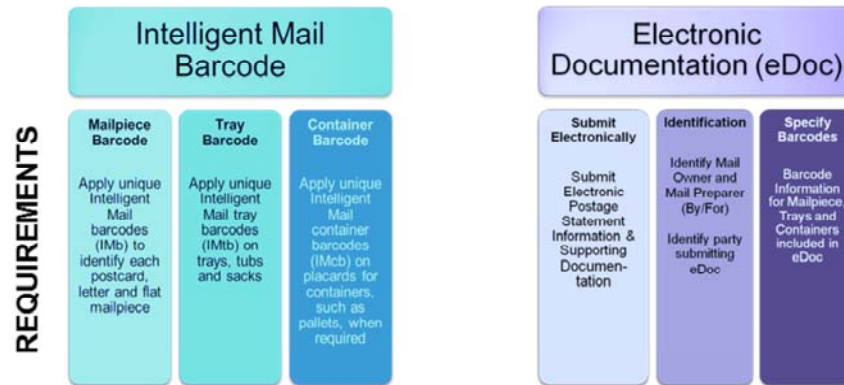
- **First-Class Mail®** postcards, letters and flats
- **Standard Mail® and Periodicals** letters and flats.
- **Bound Printed Matter** flats

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Full-Service Intelligent mail benefits the mailer by reducing costs thru additional per piece discounts on automation mailings, eliminating annual permit fees and allowing mailers to use the same permit at any location by participating in the Mail Anywhere program. It provides mailers with free Address Correction Service on Full-Service pieces, and allows mailers to monitor service with “Start-the Clock” on mail entry, as well as visibility and tracking. Full-Service Intelligent Mail is available for First-Class Mail postcards, letters and flats. Standard Mail and Periodicals letters and flats, and Bound Printed Matter flats.

Full-Service Initiative Background

Full-Service Requirements



Full list of requirements:

"Guide to Intelligent Mail for Letters and Flats"

Now that we've discussed the benefits of Full-Service, let's talk about the key Full-Service requirements. Within Full-Service, there are two categories of requirements: Intelligent Mail Barcodes must be unique and mailing documentation must be submitted electronically.

Unique Intelligent Mail Barcodes are required for Full-Service mailpieces, trays and containers. Each barcode must be unique for 45 days from the Postage Statement Mailing Date. Electronic Documentation or eDoc is also required for Full-Service mailings. eDocs, such as postage statements and qualification reports, can be sent electronically to the Postal Service using Mail.dat, Mail.XML, Postal Wizard or the Intelligent Mail for Small Business (IMsb) Tool.

Not only does this information provide the mailer with improved mail quality and streamlined mail induction it helps the USPS better manage and prioritize their workloads.

A full list of requirements is included in the Guide to Intelligent Mail for Letters and Flats.

Access this document from the RIBBS website:

https://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/GuidetoIntelligentMailLettersandFlats.pdf

Full-Service Initiative Background

Full-Service Onboarding

- ❑ These resources help mailers transition to Full-Service:
 - Full-Service Certified MSP list
 - Certified Software Vendor list
- ❑ Click here or access via RIBBS using the following path:
 - Intelligent Mail Services>Getting Started>Important Links

Important Links

Certified Full-Service Vendor Summary List ([PDF](#))

Full-Service Certified MSPs / Mail Owner Information Sheet ([PDF](#))

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Mailers not currently participating in Full-Service Intelligent mail have several resources to make the transition.

If a Mail Owner prefers not to manage the mailing process themselves, Mail Service Providers (MSP) offer a variety of solutions to prepare and present Full-Service presort mailings. The MSPs listed in the document posted on RIBBS have met the U.S. Postal Service™ Full-Service certification standards. Mail Service Providers (MSPs) offer a wide variety of services for Mail Owners. Some of the services an MSP can provide include:

- o Provide/manage an address list
- o Print and/or presort the mailing
- o Enter the mailing with the greatest discounts available
- o Manage mailing feedback, such as ACS data
- o Monitor mail quality reports

For the Mail Owner who does wish to manage their own mailing process, the Certified Software Vendor list provides a summary of vendors that offer a variety of software products to prepare and present presort mailings which support Full-Service. Each of the vendors on the list have successfully tested their Full-Service software products with the Postal Service. To meet every mailer's needs, these vendors offer a range of Full-Service solutions, at varying prices with various levels of service.

Additional information on both of these resources is available by clicking the link on the screen or going to the RIBBS site using the following path: Intelligent Mail tab, Getting Started, Important Links. <https://ribbs.usps.gov/index.cfm?page=intelligentmail>

Agenda

- Full-Service Initiative Background



Mailer Scorecard Electronic Verification Tab Updates

- Full-Service Total Additional Postage Due Display
- Full-Service Postage Assessments
- Move Update Changes
- eDoc Nesting/Sorting Validation
- Full-Service Cumulative Percent Display
- Full-Service and Fee Renewals
- Service Performance Measurement (SPM) on the Mailer Scorecard

Now that you have a little more information on the Full-Service program let's review the Full-Service mailer scorecard.

Mailer Scorecard

Electronic Verification Tab Updates

- Electronic Tab is made up of 5 components:

1. Volume Information →
2. Full-Service Verifications →
3. Move Update Validation →
4. Entry Point Validation →
5. eDoc Nesting/Sorting Validation →

Mailer Scorecard		NOVEMBER 2014	
Mailer Profile		Electronic Verification	eInduction
Metrics		Trending	% Metrics
eDoc Submitter		Total	% Trend
# Containers processed for eDoc verifications		54	54
# Handling Units processed for eDoc verifications		90	90
# Bundles processed for eDoc verifications		444	444
# Pieces processed for eDoc verifications		24,904	24,904
# Full-Service Containers		54	54
# Full-Service Handling Units		90	90
# Full-Service Carton Handling Units		19	19
# Full-Service Pieces		24,904	24,904
Full-Service Verifications			
# IHD Container Errors		5	5
# IHD HU Errors		10	10
# IHD Piece Errors		900	900
# STD Errors		...	...
# Buffer Errors		990	990
# Barcode Uniqueness Container Errors		...	...
# Barcode Uniqueness HU Errors		...	...
# Barcode Uniqueness Piece Errors		...	...
# Entry Facility Container Errors		...	...
# Entry Facility HU Errors		...	...
# Unlinked Copal Tray Errors		...	...
Total Additional Pieces Due (Full-Service Electronic) - Info Only		N/A	N/A
# Early Scheduled Ship Date Warnings		...	...
# DMU Verified USPS Transported Containers		...	...
# Default Tray Barcode Warnings		...	...
# Unlinked Copal Tray Warnings		...	...
# Unlinked Copal Bundle Warnings		...	...
Move/Update Validations - Info Only		N/A	Manual
# COA Errors		...	...
Entry Point Validations - Info Only		...	...
# eDoc/Appointment Entry Point Mismatch		...	...
# No Valid NMF Match		...	...
# Out of Date NMF Match		...	...
eDoc Nesting/Sortation Validations - Info Only		...	...
# Entry Facility Container Errors		...	...
# CSA Container Errors		...	...
# Minimum Piece Count/Wrong Bundle Errors		...	...
# Bulk Containers Bundle Errors		...	...

The mailer scorecard provides a dashboard view summarizing a mailer's electronic documentation and mail preparation performance. Within the scorecard, drill reports provide a way to determine specific mail preparation quality issues, and the conditional formatting of the scorecard offers a trending view across months. The Electronic Verification tab, located on the Mailer Scorecard, has five components: Volume Information, Full-Service Verifications, Move Update Validation, Entry Point Validation and eDoc Nesting/Sortation Validation.

Mailer Scorecard

Electronic Verification Tab Updates

- January release will affect two of these components:

- Full-Service Verifications →

- Move Update Validations →

Mailer Scorecard		NOVEMBER 2014	
Mailer Profile		Verifications	
Electronic Verification		eInduction	
Metrics		Trending	
Metrics		% Metrics	
Trending		% Trending	
eDoc Submitter		Electronic Verif	
Total		9453997	
Mailbox Company ID		119240	
# Containers processed for eDoc verifications		N/A	
# Handling Units processed for eDoc verifications		N/A	
# Bundles processed for eDoc verifications		N/A	
# Pieces processed for eDoc verifications		N/A	
# Full-Service Containers		N/A	
# Full-Service Handling Units		N/A	
# Full-Service Other Handling Units		N/A	
# Full-Service Pieces		N/A	
Full-Service Verifications			
# IHD Container Errors		15	
# IHD MU Errors		19	
# IHD Piece Errors		980	
# STTD Errors		N/A	
# Barcode Errors		980	
# Barcode Uniqueness Container Errors		N/A	
# Barcode Uniqueness MU Errors		N/A	
# Barcode Uniqueness Piece Errors		N/A	
# Entry Facility Container Errors		N/A	
# Entry Facility MU Errors		N/A	
# Unlinked Copal Tray Errors		N/A	
Total Additional Postage Due (Full-Service Electronic) - Info Only		N/A	
# Early Scheduled Ship Date Warnings		N/A	
# DMU Verified USPS Transported Containers		N/A	
# Default Tray Barcode Warnings		N/A	
# Unlinked Copal Tray Warnings		N/A	
# Unlinked Copal Bundle Warnings		N/A	
Move/Update Validations - Info Only		N/A	
# COA Errors		N/A	
Entry Facility Verifications - Info Only			
# No Container Barcode		N/A	
# No Label NAD Match		N/A	
# Out of Date NAD Match		N/A	
eDoc Handling/Sortation Validations - Info Only			
# eDoc Handling/Sortation Container Errors		40.12%	
# Labeling Last Container Errors		N/A	
# Entry Facility Container Errors		40.12%	
# COA Container Errors		N/A	

Today's training will focus on two of the components: Full-Service Verifications and Move Update Validations. Let's begin by discussing changes to the Full-Service Verifications component. Specifically, the addition of the Full-Service "Total Additional Postage Due" display.

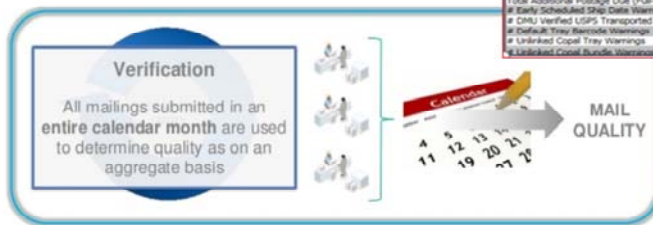
Mailer Scorecard

Electronic Verification Tab Updates

Full-Service Total Additional Postage Due Display

- ❑ Electronic Verification Tab:
 - Shows verification results for mailings submitted by eDoc
- ❑ Full-Service Section:
 - Provides monthly results from Full-Service preparation requirements
 - Results refreshed daily

Mailer Scorecard		November 2014
Verifications		
Mailer Profile		Electronic Verification
eDoc Submitter		94579900
Total		Mailing Count
Full-Service Verifications		A (12/2014)
# HSD Container Errors	5	
# HSD HU Errors	19	
# HSD Piece Errors	940	
# STD Errors	---	
# Mailer Errors	---	
# Barcode Uniqueness Container Errors	---	
# Barcode Uniqueness HU Errors	---	
# Barcode Uniqueness Piece Errors	---	
# Entry Facility Container Errors	---	
# Entry Facility HU Errors	---	
# Unlinked Copal Tray Errors	---	
Total Additional Postage Due (Full-Service Electronic) - Info Only	---	
# Early Scheduled Ship Date Warnings	N/A	
# CMU Verified USPS Transported Containers	---	
# Default Tray Barcode Warnings	---	
# Unlinked Copal Tray Warnings	---	
# Unlinked Copal Bundle Warnings	---	




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In addition to the verification procedures prompted through Performance Based Verification, or PBV, the Postal Service also performs an in-depth verification of the electronic documentation submitted with each Full-Service mailing.

The system will automatically verify a number of items populated in the eDoc by the mailer including the Mailer ID, Customer Registration ID, Service Type ID, Barcode Uniqueness, Entry Facility, and identification of the By/For relationship.

The results of this verification are displayed within the Mailer Scorecard, under the Electronic Verification Tab. The results of this verification process are aggregated over one calendar month period, and measured against established thresholds. The results appear within 48 hours of postage statement finalization with the Mailer Scorecard refreshed on a daily basis to provide current mail quality trend information as mailings are verified throughout the month.

Agenda

- ❑ Full-Service Initiative Background
- ❑ Mailer Scorecard Electronic Verification Tab Updates
-  ■ **Full-Service Total Additional Postage Due Display**
 - Full-Service Postage Assessments
 - Move Update Changes
 - eDoc Nesting/Sorting Validation
- ❑ Full-Service Cumulative Percent Display
- ❑ Full-Service and Fee Renewals
- ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

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With the January 2015 release a new line titled “Total Additional Postage Due (Full-Service Electronic)” will display on the mailer scorecard. Let’s review this update now.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Total Additional Postage Due Display

Additional Postage Calculation



errors above threshold
FS discount claimed on pieces

Additional Postage

- New line added "Total Additional Postage Due (Full-Service Electronic)"
 - Currently line is informational only
 - USPS expects to start invoicing for errors in future

Total Additional Postage Due (Full-Service Electronic) - Info Only	--
# Early Scheduled Ship Date Warnings	N/A
# DMU Verified USPS Transported Containers	--
# Default Tray Barcode Warnings	--
# Unlinked Copal Tray Warnings	--
# Unlinked Copal Bundle Warnings	6

Mailer Scorecard		November 2014
		Verifications
		Electronic Verification eInduction
		# Metrics # Trending % Metrics % Trending
		Electronic V
eDoc Submitter	Total	945,998
		Mailbox Comp A (2220)
Full-Service Verifications		
# MDO Container Errors		5
# MDO HU Errors		19
# MDO Piece Errors		900
# STTD Errors		--
# Balfax Errors		900
# Barcode Uniqueness Container Errors		--
# Barcode Uniqueness HU Errors		--
# Barcode Uniqueness Piece Errors		--
# Entry Facility Container Errors		--
# Entry Facility HU Errors		--
# Unlinked Copal Tray Errors		--
Total Additional Postage Due (Full-Service Electronic) - Info Only		N/A
# Early Scheduled Ship Date Warnings		--
# DMU Verified USPS Transported Containers		--
# Default Tray Barcode Warnings		--
# Unlinked Copal Tray Warnings		--
# Unlinked Copal Bundle Warnings		6

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[VO:] The additional postage is calculated based on the number of errors over the threshold times the Full-Service claimed on the pieces. At this time, the line is informational only and mail should not be held as a result of the figure listed. This information can help Mailers fix errors now and avoid paying additional postage in the future. The Postal Service expects to begin invoicing for these errors in the summer of 2015. Note, this dollar figure is only viewable in the number metrics view.

Agenda

- ❑ Full-Service Initiative Background
- ❑ Mailer Scorecard Electronic Verification Tab Updates
 - Full-Service Total Additional Postage Due Display
 - **Full-Service Postage Assessments**
 - Move Update Changes
 - eDoc Nesting/Sorting Validation
- ❑ Full-Service Cumulative Percent Display
- ❑ Full-Service and Fee Renewals
- ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

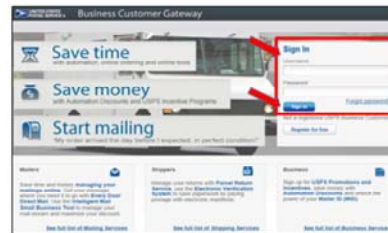
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Now we will discuss Full-Service Postage Assessments.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- ❑ View Mail Entry Invoice Reports that display Full-Service additional postage amounts
 - Reports are for informational only and used by the mailer to fix related issues
- ❑ At this time USPS will not:
 - Hold mailings based on scorecard results
 - Deny mailer the Full-Service discount
- ❑ To review invoices:
 - Mailers must set up VAE for each CRID through the BCG



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In January, mailers will be able to view the Mail Entry Invoice Reports that displays information from the “Total additional postage due” line of the mailer scorecard. These reports are informational only and should be used by the mailer to fix related issues. In January, mailings will not be held based on scorecard results nor will the USPS deny the mailer the Full-Service discount based on scorecard results.

To review these invoices, a mailer must first set up a Verification Assessment Evaluator (VAE) for each CRID through the Business Customer Gateway (BCG). Let’s review how to set up a VAE.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- The mailer selects “Manage Account” and then selects the “Manage Services” tab

The screenshot displays the USPS Business Customer Gateway interface. On the left, a vertical menu lists various options, with 'Manage Account' at the bottom highlighted by a red rectangular box. Above this menu, a horizontal tab bar contains 'Manage Profile', 'Manage Performance', 'Manage Services' (highlighted with a red box), 'Manage Locations', and 'Manage Users'. The main content area under the 'Manage Profile' tab shows user details for 'PONEPROO PONEPROO' with an email address and phone number. It includes checkboxes for 'Name', 'Phone', and 'Email'. Below this is the 'Home Business Location' section with address details and a 'TERMS AND CONDITIONS' link. At the bottom left, it shows 'CRID : 5098250' and 'MID : View your Mailer ID'. On the right side, there is a 'Favorite Services' section with buttons for 'DA (DISCOUNT)', 'ELECTRONIC DATA EXCHANGE', 'MAILER ID', 'MAILING REPORTS', 'MANAGE PERMITS', 'ONLINE ENROLLMENT', and 'POSTAL INQUIRY', along with an 'EDIT FAVORITES' button.

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To set up a VAE, the mailer selects “Manage Account” on the left menu and then select the “Manage Services” tab at the top.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

Manage Services

Manage your access to services. Manage Services to your one-stop shop for anything services related. You can request access to services and view the services you already have access to.

You are currently viewing your services by location. To manage multiple locations by service, click below.

Select which location you want to manage:

Business Services

Service	Status	Access	Action
Mail Entry & Payment Technology	Approved	Yes	NA
Click to Ship Business Pay™	Approved	Yes	NA
Customer Label Distribution System (CLDS)	NA	NA	Get Access
Customer/Supplier Agreements (CSA)	Available	Not Yes	Get Access
Electronic Verification Service (EVS)	Available	Not Yes	Get Access
Event Date Check Mail	Approved	NA	Get Access
Invoice Program	Approved	Yes	NA
Intelligent Mail Small Business (ISBS) Tool	Approved	NA	Get Access
Logistics Condition Reporting System (LCRS)	Available	Not Yes	Get Access
Mail Forwarding/Equipment Ordered System (MFCOS)	Approved	Not Yes	Get Access
Mailbox ID	Approved	Yes	NA
Manage Printing Labels	Approved	Yes	NA
Online Enrollment	Approved	Yes	NA
Payment Station Service (PMS)	Available	Not Yes	Get Access
Scan Based Payment (SBP)	Available	Not Yes	Get Access
Schedule a Mailing Appointment (SAM)	Available	Not Yes	Get Access
USPS Package Manager	Available	Not Yes	Get Access
Verification Assessment Evaluator (VAE)	Available	Not Yes	Get Access

- ❑ Select desired CRID from the dropdown menu
- ❑ Click 'Get Access' located beside Verification Assessment Evaluator
- ❑ The status of the VAE request will then be updated to 'Pending BSA'
- ❑ Once the BSA Approves, the status will change to 'Approved'

Pending BSA

Approved

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Then, the Mailer selects the desired CRID from the dropdown menu. Next, they must click 'Get Access' located beside Verification Assessment Evaluator.

The status of the VAE request will then be updated to 'Pending BSA'. Once the BSA Approves, the status will change to 'Approved'.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- Mailer VAE receives automated postage assessment notification email:
 - In the case that an invoice is generated, an email notification will be sent to the designated VAE
 - Clicking on the link in the email opens the BCG Gateway login page
 - VAE will follow the path in the e-mail to access the correct reports

The following invoice has been generated on the Mail Entry Invoice Report. Payment is due in 10 business day(s):

CRID: 94539986
CRID Name: Mailing Company A
Invoice Month: MARCH 2014
Total Postage Due: \$94.36
Due Date: 19 AUGUST 2014

To view the status of this invoice on Business Customer Gateway please click [here](#) and go to Mailing Reports > Mail Entry Invoice Report.

To view the detailed mail entry invoice information on Microstrategy Reports please click [here](#) and go to Shared Reports > Mail Quality (eDOC Submitter) > Invoice Summary Report (eDoc Submitter)

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The Mailer VAE receives an automated invoice notification email. In the case that an invoice is generated, an email notification will be sent to the designated VAE. Clicking on the link in the automated email opens the BCG Gateway login page. The Mailer's VAE will follow the path in the e-mail to access the correct reports.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- ❑ The mailer will then sign into the BCG

UNITED STATES POSTAL SERVICE® Business Customer Gateway

Save time
with automation, online ordering and online tools

Save money
with Automation Discounts and USPS Incentive Programs

Start mailing
"My order arrived the day before I expected, in perfect condition!"

Sign In

Username
Password

[Sign in](#) [Forgot password?](#)

Not a registered USPS Business Customer?
[Register for free](#)

Mailing
Save time and money managing your mailings online. Get your message where you need it to go with Every Door Direct Mail. Use the Intelligent Mail Small Business Tool to manage your mail stream and maximize your discount.
[See full list of Mailing Services](#)

Shippers
Manage your returns with Parcel Return Service, use the Electronic Verification System to save paperwork by paying postage with electronic manifests.
[See full list of Shipping Services](#)

Business
Sign up for USPS Promotions and Incentives. Save money with Automation Discounts and unlock the power of your Mailer ID (MID).
[See full list of Business Services](#)

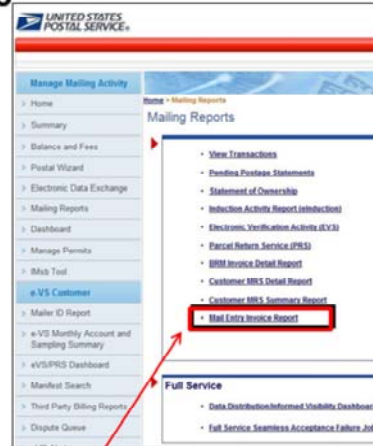
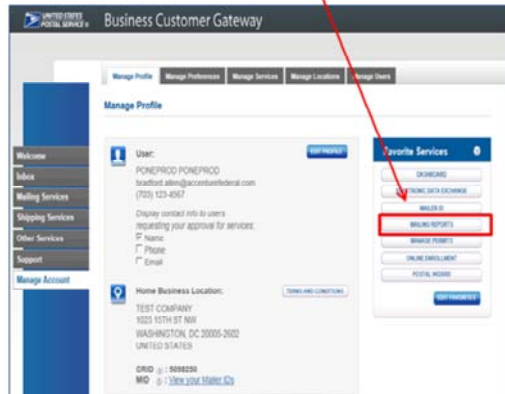
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The mailer will then sign into the BCG.

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- ❑ Mailer selects 'Mailing Reports' from the favorites menu



- ❑ Then selects 'Mail Entry Invoice Report'

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Next, the mailer selects 'Mailing Reports' from the favorites menu, then selects 'Mail Entry Invoice Report'.

Full-Service Postage Assessments

- Report generated 11th of every month for errors that exceed threshold across all mailings from previous calendar month

Verification	Threshold
Service Type ID	2%
Mailer ID	2%
Unique Piece Barcode (IMb), Tray Barcode (IMtb), and Container Barcode (IMcb)	2%
By/For	5%*
Co-Palletization	5%
Entry Facility	5%

The Mail Entry Invoice Summary Report (shown here) displays the total postage due from Full-Service Electronic Verification. Mailers can filter their search by date, eDoc CRID, Mailing Group ID, Mail Job, and Status. These reports are generated on the 11th of every month for errors that exceeded the threshold across all mailings for the previous calendar month.

Full-Service Postage Assessments

- ❑ From the search results, click on the “Impact from Full Service Electronic Verification” to view Mail Entry Invoice Detailed Report
- ❑ In January, only the Full-Service related columns will display data

[illegible]

From the Search results, click on the “Impact from Full Service Electronic Verification” to view the Mail Entry Invoice Detailed Report. An example of the search results is shown here. In January, only the Full-Service related columns will display data.

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Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

- Mail Entry Invoice Detail Report Full-Service errors section

Errors		Additional Postage Amount	Adjusted Additional Postage Amount	Assessed Error Count	Assessed Error as % of
Impact from Full Service Electronic Verification	Mailer ID Container				
	Mailer ID Tray				
	Mailer ID Piece				
	Service Type ID				
	Offset				
	Unique Container Barcode				
	Unique Tray Barcode				
	Unique Piece Barcode				
	Co-Publication	\$0.10	\$0.10	10	100.00%
	Entry Facility Container				
	Entry Facility Tray				
Additional Postage Amount			\$0.10		
Adjusted Additional Postage Amount			\$0.10		
Postage Due			\$0.10		
Account Number					

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Here is a closer view of the Full-Service errors section of the Mail Entry Invoice Detail Report.

Mail Entry & Payment Technology

Full-Service Mailer Scorecard Electronic Tab Updates

Full-Service Postage Assessments

□ Explanation of Mail Entry Invoice Detail Report fields

Report Field Name	Definition
Due Date	Changes as reviews are requested and completed
Customer Information	Contains comments from customer re review requests
Original Postage Error	Original postage amount paid for the piece/tray/container that are subject to assessment
Error Count	Count of errors that exceed the error threshold and are subject to assessment
Error % or PAF	Overall % of errors or the postage adjustment factor being applied to the errors
USPS Correspondence Information	Comments from USPS regarding the disposition of reviews
Mailer ID Container	Includes all Mailer Container Errors (Error Code 7301) that are above the FS error threshold for the previous month
Mailer ID Tray	Includes all Mailer Tray Errors (Error Code 7302) that are above the FS error threshold for the previous month
Mailer ID Piece	Includes all Mailer Piece Errors (Error Code 7304) that are above the FS error threshold for the previous month.
Service Type ID	Includes all Service Type ID Error codes that are above the FS error threshold for the previous month (Error Codes 7101-7103, 7107)
By/For	Includes all By/For Errors (Error Codes 7101-7143) that are above the FS error threshold for the previous month

Explanations of the fields in the Mail Entry Invoice Detail Report are noted in the table on this screen.

- The Due Date changes as reviews are requested and completed.
- Customer Information contains comments from the customer, for example, review requests.
- Original Postage Error is the original postage amount paid for the piece/tray/container that are subject to assessment.
- Error Count is the count of errors that exceed the error threshold and are subject to assessment.
- Error % or PAF is the overall % of errors or the postage adjustment factor being applied to the errors.
- USPS Correspondence Information includes comments from USPS regarding the disposition of reviews.
- Mailer ID Container includes all Mailer Container Errors (Error Code 7301) that are above the FS error threshold for the previous month.
- Mailer ID Tray includes all Mailer Tray Errors (Error Code 7302) that are above the FS error threshold for the previous month.
- Mailer ID Piece includes all Mailer Piece Errors (Error Code 7304) that are above the FS error threshold for the previous month.
- Service Type ID includes all Service Type ID Error codes that are above the FS error threshold for the previous month (Error Codes 7101-7103, 7107).
- By/For includes all By/For Errors (Error Codes 7110, 7140, 7142, that are above the FS error threshold for the previous month.

Full-Service Mailer Scorecard

Electronic Tab Updates

Report Field Name	Definition
Unique Container Barcode	Includes all Unique Container Barcode Errors (Error Codes 4, 7501-7504) that are above the FS error threshold for the previous month
Unique Tray Barcode	Includes all Unique Tray Barcode Errors (Error Codes 13, 7601-7605) that are above the FS error threshold for the previous month
Unique Piece Barcode	Includes all Unique Piece Barcode Errors (Error Codes 21, 25, 7701-7708) that are above the FS error threshold for the previous month
Co-Palletization	Includes all Co-Palletization Errors (Error Codes M4000-M4003) that are above the FS error threshold for the previous month
Entry Facility Container	Includes all Entry Facility Container Errors (Error Codes 7016, 7017) that are above the FS error threshold for the previous month.
Entry Facility Tray	Includes all Entry Facility Tray Errors (Error Codes 7018, 7019) that are above the FS error threshold for the previous month.
Original Amount Due	Sum of original postage
Adjusted Postage	Original postage + assessment amounts
Postage Due	Difference between original postage and adjusted postage
Account Number	If payment has been made, the account number used for the postage assessment

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Continuing our review of the report fields and their definitions:

- Unique Container Barcode includes all Unique Container Barcode Errors (Error Codes 7501-7503) that are above the FS error threshold for the previous month.
- Unique Tray Barcode includes all Unique Tray Barcode Errors (Error Codes 7601-7605) that are above the FS error threshold for the previous month.
- Unique Piece Barcode includes all Unique Piece Barcode Errors (Error Codes 7701-7705) that are above the FS error threshold for the previous month.
- Co-Palletization includes all Co-Palletization Errors (Error Codes M4006, M4007) that are above the FS error threshold for the previous month.
- Entry Facility Container includes all Entry Facility Container Errors (Error Codes 7016, 7017) that are above the FS error threshold for the previous month.
- Entry Facility Tray includes all Entry Facility Tray Errors (Error Codes 7018, 7019) that are above the FS error threshold for the previous month.
- Original Amount Due is the sum of original postage.
- Adjusted Postage is the original postage plus assessment amounts.
- Postage Due is the difference between original postage and adjusted postage.
- Account Number (if payment has been made) is the account number used for the postage assessment.

Agenda

- ❑ Full-Service Initiative Background
- ❑ Mailer Scorecard Electronic Verification Tab Updates
 - Full-Service Total Additional Postage Due Display
 - Full-Service Postage Assessments
 - ➔ ■ **Move Update Changes**
 - eDoc Nesting/Sorting Validation
- ❑ Full-Service Cumulative Percent Display
- ❑ Full-Service and Fee Renewals
- ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

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Now let's cover the changes to the Move Update component of the Electronic Verification Tab. As we review this section, keep in mind the Move Update data displayed on the mailer scorecard is informational only, and is intended to help mailers correct Move Update errors in preparation of the process being implemented in the future.

Full-Service Mailer Scorecard Electronic Tab Updates

Move Update

- ❑ Standard means to reduce number of mailpieces that require forwarding or return by periodically matching mailer's address records with Change of Address (COA) orders
- ❑ Mailers who claim presorted or automation prices for First-Class Mail or Standard Mail service must demonstrate that they have updated their mailing list within 95 days before the mailing date



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The Move Update standard is a means of reducing the number of mailpieces requiring forwarding or return by periodically matching the mailer's address records with change-of-address (COA) orders received and maintained by the Postal Service. Mailers who claim presorted or automation prices for First-Class Mail® or Standard Mail® service must demonstrate that they have updated their mailing list within 95 days before the mailing date.

Full-Service Mailer Scorecard Electronic Tab Updates

Move Update

Mailers must use one of the preapproved or alternative methods to meet the Move Update standard

□ 3 Preapproved Methods:

- ACS
- NCOA^{Link} and NCOA^{Link} MPE
- Ancillary Service Endorsements
 - Except for Forwarding Request Service

□ 2 Alternative Methods:

- 99% Accurate
- Legal Restraint



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Mailers must use one of the preapproved or alternative methods to meet the Move Update standard. The Move Update standard is met when an address is updated with an approved method within 95 days of the date of mailing. NOTE Standard Mail bearing an alternative address format is excluded from the Move Update standard.

The Postal Service offers three preapproved methods: 1) ACSTM, 2) NCOA^{Link}[®] and NCOA^{Link} MPE, and 3) Ancillary Service Endorsements except for Forwarding Service Requested.

NCOALink is a method used by mailers to update their list prior to mailing. It is available only through companies licensed by the Postal Service. NCOALink MPE (Mail Processing Equipment) is a pre-mailing method that uses a Multiline Optical Character Reader (MLOCR) system or a Remote Video Encoding (RVE) system to print the COA update directly on the mailpiece as it is being processed. Address Change Service (ACS) is service that allows mailers to electronically receive change-of-address information and reasons for non-delivery after mailing. This method reduces the number of manual (hardcopy) address notifications. The last method is the use of an appropriate Ancillary Service Endorsement printed on the mailpiece.

For First-Class Mail and First-Class Package Service only, two alternative methods are also available that require separate approval from the USPS National Customer Support Center: 99 Percent Accuracy and Legal Restraint.

When mailers can demonstrate they have a highly effective method to keep their addresses current, they can obtain authorization to use the 99 percent accurate method of compliance with the Move Update standard. When a legal restriction prevents mailers from updating their customer's address without direct contact from the customer, they can be authorized to use the Legal Restraint method to comply with the Move Update standard. To obtain authorization, the mailer must show that a particular law prohibits the mailer from using a primary method to meet the Move Update standard.

Mail Entry & Payment Technology

Full-Service Mailer Scorecard Electronic Tab Updates

Move Update

Mailers with 75% or more Full-Service

- Comparison of mail processing scans to address information listed in eDoc to measure Move Update quality
- Propose threshold of 0.8%
- Intend to replace MERLIN Move/Update verification in the future

Move Update Validation – Info Only:

- COA Error occurs when COA is associated to eDoc
- Either the COA create date or effective date is between 95 days and 18 months of the postage statement finalization date
- Notes whether the Move Update for a CRID was manual or automated

Mailer Scorecard November 2014

Verifications

Electronic Verification

Subduction

Seamless

Metrics # Trending % Metrics % Trending

Move Update postage assessment informational only

Move/Update Validations – Info Only

Type of Move/Update verification	N/A	Automated
% COA Errors	N/A	N/A

Move/Update Validations – Info Only

Type of Move/Update verification	N/A	Automated
% COA Errors	N/A	N/A

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The Postal Service uses mail processing equipment scans and eDocs to measure Move Update quality for mailers who submit 75 percent or more of their eligible volume as Full-Service. In November 2014, Move Update data was displayed on the mailer scorecard to help mailers investigate related issues in preparation of its future implementation.

Let's review how the process works. Electronic COA records are created when a mailpiece is forwarded or identified as "undeliverable-as-addressed." The electronic record includes the change effective date and date the COA was filed with the Postal Service. If the COA is associated to the mailer's eDoc, and either the COA create date or the effective date is between 95 days and 18 months before the date of the mailing, a COA error will be generated.

Mail processing scans are compared to the address information listed for the piece in the eDoc to measure Move Update quality. These Full-Service mailers see the results of the verification on the mailer scorecard in the line titled "% COA Errors". The results are listed by CRID instead of by job, and are aggregated over a calendar month against the proposed threshold of 0.8 percent. Please note that at this time, mail will not be refused or held based on these results. Although the Postal Service intends to replace MERLIN for Move Update verification in the future, at the current time, acceptance employees will continue to run MERLINS as prompted by PBV.

The Type of Move Update Verification field notes whether the Move Update for a particular CRID was manual or automated.

Full-Service Mailer Scorecard Electronic Tab Updates

Move Update

Automated Move Update:

- ❑ First day of the month, the automated system determines whether the Full-Service adoption for a mailer was greater than 75% over the period of the past 30 days
- ❑ If the mailer has greater than 75% of mail in Full-Service, Move Update verifications are considered automated and no longer occur in MERLIN
 - For these mailers, all mail will go through Move/Update verifications
- ❑ For monthly invoice reporting, the percentage of Move/Update eligible pieces in error will be determined, and if greater than the error threshold, a dollar amount will be assigned to errors above the threshold and mailer will be invoiced
- ❑ Information on pieces that fail the Move/Update verification are available by drilling down in the Mailer Scorecard. Note, errors displayed are limited to 100 per job.

Manual Move Update through MERLIN:

- ❑ For mailers not qualified at 75%, no automated Move/Update verification will be performed
 - For these mailers, no information will be available in the Mailer Scorecard as they will continue to receive verification through MERLIN

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Continuing our discussion of Move Update validations, here are some key points about the Automated Move Update versus the Manual Move Update through MERLIN.

For the Automated Move Update:

On the first day of the month the automated system determines whether the Full-Service adoption for a mailer was greater than 75 percent over the period of the past 30 days. If the mailer has greater than 75 percent of mail in Full-Service, Move Update verifications are considered automated and no longer occur in MERLIN. For these mailers, all mail will go through Move Update verifications. For monthly invoice reporting, the percentage of Move Update eligible pieces in error will be determined, and if greater than the error threshold, a dollar amount will be assigned to errors above the threshold and the mailer will be invoiced. Any piece that fails the Move Update verification is available by drilling down in the Mailer Scorecard. Note, errors displayed are limited to 100 job.

For the Manual Move/Update Through MERLIN:

For mailers not qualified at 75 percent, no automated Move Update verification will be performed, no information will be available on the mailer scorecard, and the mail will continue to be verified through MERLIN.

Full-Service Mailer Scorecard Electronic Tab Updates

Move Update

Current

Volumes attributable to:

- Mailers authorized to use the legal restraint method and
- Single piece mailings

Are included in the measurement for Move Update compliance

January 2015

- Mailers authorized to use the legal restraint method and/or volumes related to single piece mailings will be excluded

Mailer Scorecard		November 2014	
		Verifications	
Mailer Profile		Electronic verification	Seamless
		Production	Seamless
		# Metrics	# Trending
		% Metrics	% Trending
		Electronic Verification	
nDoc Submitter		Total	PS Volume
# Containers processed for eDoc verifications		26	21
# Handling Units processed for eDoc verifications		169	169
# Bundles processed for eDoc verifications		---	---
# Pieces processed for eDoc verifications		28,765	18,540
# Full-Service Containers		26	21
# Full-Service Handling Units		169	169
# Full-Service Orphan Handling Units		---	---
# Full-Service Verifications		---	---
% PS Mail Volume (PS Volume/PS Dtpile)		100.00%	100.00%
% HSD Container Errors		23.08%	26.57%
		Move/Update Validations - Info Only	
Type of Move/Update verification		N/A	Automated
% COA Errors		N/A	N/A
		Move/Update Validations - Info Only	
% Entry Facility Container Errors		46.15%	87.14%
% Entry Facility HU Errors		N/A	N/A
% Unlinked Copal Errors		50.00%	50.00%
% Early Scheduled Ship Date Warnings		---	N/A
% Default Ship Date Warnings		---	N/A
% Unlinked Copal Warnings		---	N/A
		Move/Update Validations - Info Only	
Type of Move/Update verification		N/A	N/A
% COA Errors		N/A	N/A

Currently, mailers who are authorized to use the legal restraint method and volumes related to single piece mailings are included in the measurement for Move Update compliance

With the January 2015 release, mailers who are authorized to use the legal restraint method and volumes related to a single piece mailings will be excluded from the measurement for Move Update compliance.

Agenda

- ❑ Full-Service Initiative Background
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- ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

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Finally, let's review the January enhancements to the eDoc Nesting/Sorting Validation.

Full-Service Mailer Scorecard Electronic Tab Updates

eDoc Nesting/Sorting Validation January Enhancements

	Current	January 2015
CIN field	Error displays when CIN field blank in eDoc for mail class of Periodicals and sub-category of Newspapers	No longer display error
Depth of Sort Errors	Displays when handling unit at a finer level of presort could have been prepared <ul style="list-style-type: none"> Ignored if handling unit contains < minimum number of pieces per DMM 	Add a default value for minimum pieces per handling unit <ul style="list-style-type: none"> Default value initially set at 150 pieces when minimum pieces/handling unit not specified in DMM
Depth of Sort Errors: Zip Codes	All presort overflow trays result in minimum piece errors	Allow one overflow tray, or tray without minimum number of pieces of the same sortation level

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
Within the Electronic Tab the eDoc Nesting/Sorting Validation a few items have been enhanced as part of the January release. They include the Content Identification Number (CIN) field and Depth of Sort Errors.

CIN Field: Full-Service mailers are required to apply unique Intelligent Mail tray barcodes (IMtb) on handling unit labels. Uniquely identifying each tray or sack with a barcode allows them to be tracked as they progress through the USPS mailstream. The IMtb includes six fields, one of which is a Content Identification Number (CIN) field. A CIN is a 3-digit field describing presort qualification of mail in a tray or sack. A table of valid CINs can be found in the Domestic Mail Manual (DMM), section 708.6.2.4. [Click here](#) to access the hyperlink.

Depth of Sort Errors: Another January 2015 enhancement involves Depth of Sort verifications. Currently, Depth of Sort Errors will display on the Mailer Scorecard when a handling unit at a finer level of presort could have been prepared. The Depth of Sort errors are ignored if the handling unit contains less than the minimum number of pieces per the Domestic Mail Manual (DMM). With the January 2015 enhancements, Seamless Acceptance will add a default value for minimum pieces per handling unit. A default value initially set at 150 pieces is used when minimum pieces/handling unit is not specified in the DMM. To illustrate this concept with an example, consider a 3-digit Presort tray that contains 80 total pieces, 25 of which are from the same 5-digit area. The Depth of sort errors are not logged because the minimum piece count was not met.

The last update to Depth of Sort verifications involves presort ZIP codes. Currently, all presort overflow trays result in minimum piece errors. Additional enhancements to the eDoc Nesting and Sortation process scheduled for January 2015 include allowing each Presort ZIP codes to have one overflow tray, or tray without the minimum number of pieces of the same sortation level. This will reduce the number of minimum piece errors logged for a tray in a particular job for that Presort ZIPCode.

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- ❑ Full-Service Initiative Background
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-  **Full-Service Cumulative Percent Display**
 - ❑ Full-Service and Fee Renewals
 - ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

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In the next section we will review Full-Service Cumulative Percent Display.

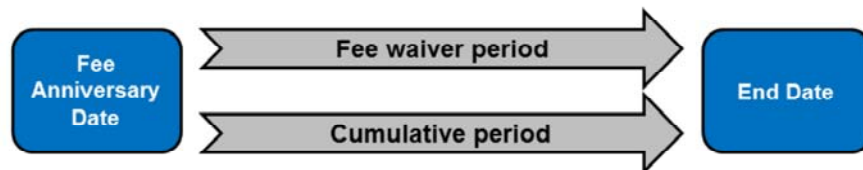
Full-Service Cumulative Percent Display

Background on Cumulative Percentage and Fee Waiver

- ❑ Mailers claiming presorted rates pay an annual fee for each permit
- ❑ Annual fee is waived if:
 - Full-Service mailing
 - Cumulative % is consistently maintained at 90% or greater
- ❑ Cumulative % is calculated using the following formula:

$$\text{Cumulative FS \%} = \frac{\text{Number of FS Pieces}}{\text{Total FS Eligible Pieces}}$$

- ❑ As of Nov 2013 fee waiver changed from per-mailing to cumulative Full-Service %



Note: Fee waiver period and cumulative period are concurrent

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Before we talk about the new Full-Service cumulative percentage display, let's review how the annual fee waiver and cumulative percentage periods work.

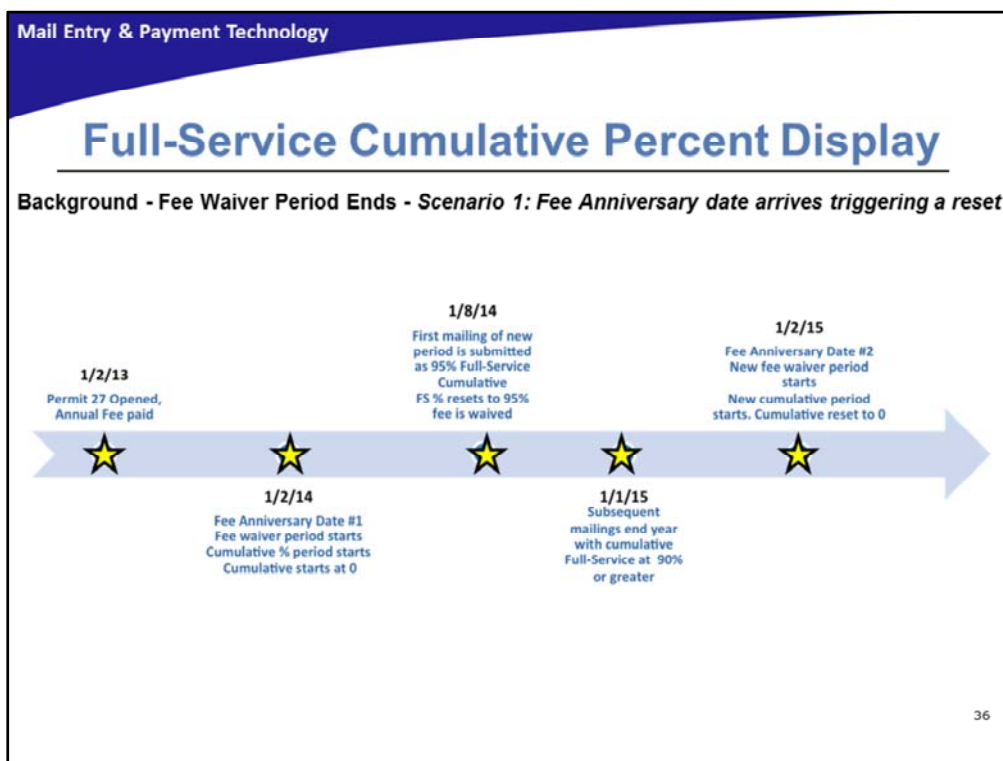
Mailers claiming presort rates are required to pay an annual fee for each permit. The annual fee covers a one year period. The date the annual fee is due is known as the fee anniversary date.

The annual fee will be waived by *PostalOne!* if the mailing is Full-Service AND the cumulative percentage for the permit is maintained at 90 percent or greater.

The cumulative percentage is calculated by dividing the number of Full-Service pieces mailed, by the total number of Full-Service eligible pieces. Remember, prior to November 2013 the Full-Service fee waiver was applied on a per-mailing basis. Now the Full-Service fee waiver is applied on a cumulative basis.

The fee waiver and the cumulative periods both start on the fee anniversary date.

The fee waiver period and cumulative percentage period run concurrently.



Now we will use two scenarios to explain what would cause an annual fee waiver period to end.

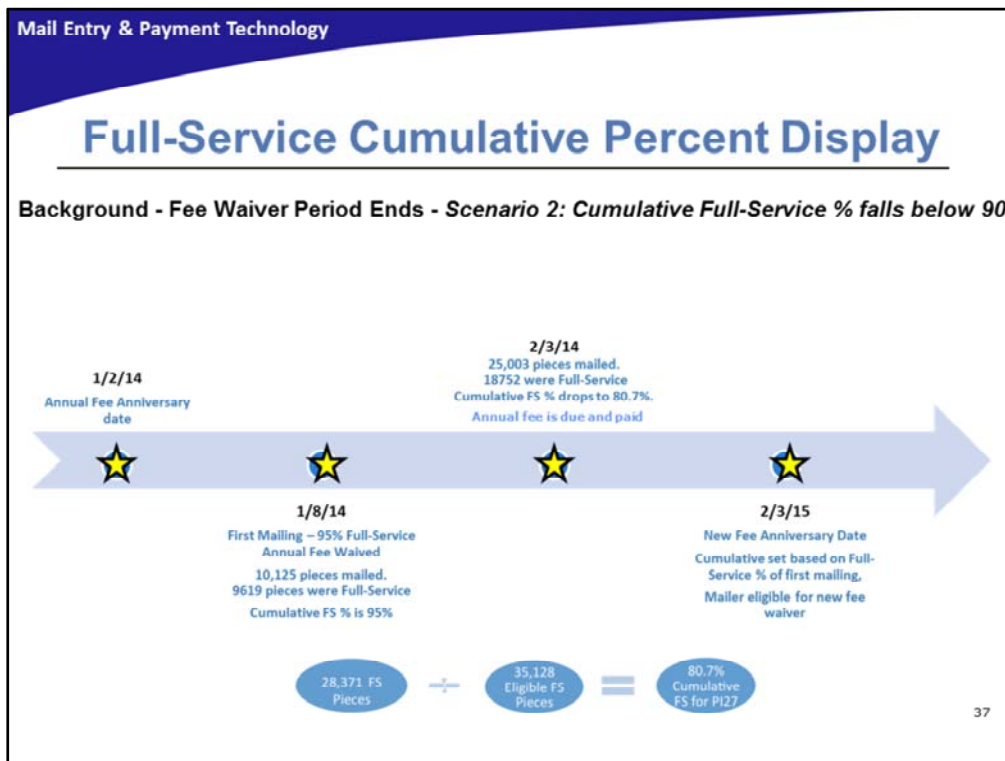
Remember that as long as a mailer prepares mailings whose cumulative Full-Service percentage is at or above 90, the annual fee will be waived.

For this first scenario, permit 27 was opened on January 2nd, 2013 and the annual fee was paid. The fee anniversary date, or the date when the annual fee is due, is January 2, 2014, one year from the day the permit was issued. On January 2, 2014 the fee waiver period starts. The cumulative percentage period starts, and the cumulative percent starts at zero.

The mailer prepares a Full-Service mailing, for permit 27, where 95% of the pieces in the mailing are Full-Service. The mailer presents this mailing to the BMEU on January 8, 2014. The cumulative Full-Service percent resets to 95 percent. Normally *PostalOne!* would request an annual fee payment because this is the first mailing, after the fee due date of January 2, 2014. Since the percentage of Full-Service pieces in this mailing is over 90, *PostalOne!* waives the annual fee.

As long as all subsequent mailings, submitted under this paying permit, maintain a cumulative of 90 percent or greater Full-Service, the annual fee will continue to be waived or deferred. On January 1st, 2015 the mailer ends the year with a cumulative Full-Service percent that is at, or greater than 90. On January 2, 2015 the process starts over, the cumulative Full-Service percent resets to zero, the fee waiver period and the cumulative Full-Service percentage period start over.

Now let's discuss the second scenario that will cause the fee waiver period to end, the mailer's Full-Service cumulative percent falls below 90.



Remember the mailer's annual fee was originally due on January 2, 2014 but because the mailer submitted a mailing above the 90% Full-Service threshold the fee was waived.

Now let's discuss what will happen if the same mailer falls below the 90% cumulative Full-Service threshold. Let's say the mailer mailed the following mailings for permit 27.

- On January 8, 2014, 10,125 pieces were mailed. 9,619 pieces were prepared as Full-Service. The cumulative Full-Service percentage for permit 27 is 95 percent.
- The mailer presents a second mailing to the BMEU on February 3, 2014. 25,003 pieces were mailed. 18,752 were prepared as Full-Service. The cumulative Full-Service percent for permit 27 drops from 95 to 80.7 percent.

The cumulative percent is calculated by dividing the number of Full-Service pieces, by the total number of eligible Full-Service pieces.

In the example above the mailer presented 28,371 Full-Service pieces but had a total of 35,128 eligible Full-Service pieces on two separate days.

28,371 Full-Service pieces divided by 35,128 eligible Full-Service pieces equals 80.7% which now represents the cumulative Full-Service percentage for permit 27.

With the February 3, 2014 mailing *PostalOne!* will indicate the annual fee must be collected for permit 27, since 80.7 percent is below the 90 percent cumulative Full-Service threshold. The annual fee is collected and Permit 27 is no longer eligible for a fee waiver. A new fee period of February 3, 2014 through February 3, 2015 is set. The new fee anniversary date for permit 27 is February 3, 2015.

On this date of February 3, 2015, permit 27 becomes eligible once again, for a fee waiver.

A new cumulative Full-Service percentage will be calculated with the first mailing on, or after February 3, 2015. NOTE Any mailings made prior to February 3, 2015 will not be counted towards this Full-Service cumulative percentage. Subsequent mailings will affect this cumulative Full-Service percentage.

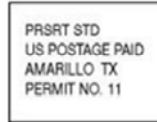
The fee waiver period and cumulative percentage period start over. The fee waiver period and cumulative percentage period will run from February 3, 2015 through February 3, 2016 provided the mailer stays at or above the cumulative Full-Service 90 percent or greater threshold.

Full-Service Cumulative Percent Display

Background – Full-Service Mailer Opens New Permit

Postage can be paid by:

- ☐ Permit imprint
 - One time application fee required
- ☐ Meter or Pre-Canceled stamp
 - No application fee required



No annual fee should be due when a Full-Service mailer opens a permit

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Now let's review what happens when a Full-Service mailer opens a new permit. As you're aware, postage can be paid in one of three ways: permit imprint, postage meter or pre-canceled stamp. If the mailer chooses to pay postage by permit imprint, there is a one time application fee. This one time application fee is not required if the postage will be paid by metered or pre-canceled permit. Since the mailer is a Full-Service mailer no annual fee should be collected when the permit is opened.

Full-Service Cumulative Percent Display

January 2015 Enhancements

- ❑ Currently, mailers cannot view their Full-Service cumulative %
- ❑ With the January release, mailers gain insight into Full-Service cumulative % and BMEU Employees can assist mailers more effectively

Purpose

- ❑ Add enhancements for Full-Service Cumulative Percent

Approach

- ❑ Display Full-Service cumulative percentage details by mail class and by permit
- ❑ Track current status of Full-Service fees
- ❑ CAPS auto fee renewal will not take place if Full-Service percent is at or above 90% on fee anniversary date

Goal

- ❑ Mailers view Full-Service cumulative % in Business Customer Gateway (BCG) and BMEU employees view Full-Service cumulative % in *PostalOne!* system
- ❑ Allows mailer to keep track of their Full-Service cumulative %

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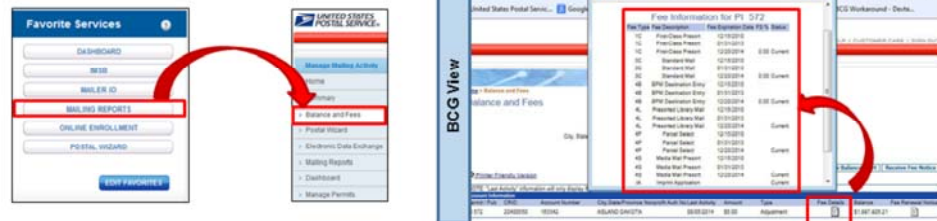
Now that we've reviewed how the Full-Service fee waiver and cumulative percentage work, let's discuss what is changing with this release. Under the current system, mailers and BMEU acceptance employees have no way to view the Full-Service cumulative percentage or fee status in the Business Customer Gateway (BCG) or *PostalOne!*.

With the January 2015 release, this information will be displayed on several screens in the BCG *PostalOne!*, allowing mailers to easily track their Full-Service cumulative percentage and fee status. If a mailer maintains a Full-Service cumulative percent of at least 90 on the fee anniversary date, the Centralized Account Processing System (CAPS) auto fee renewal will not be triggered. If the first mailing after the anniversary date is below 90% (example: 89%), the fee will be due.

The display enhancements will not only allow mailers to keep better track of their Full-Service percentage, but it will also help BMEU acceptance employees assist mailers more effectively.

Full-Service Cumulative Percent Display

Business Customer Gateway



- ❑ Mailers can view Full-Service cumulative % by logging into the BCG, selecting Mailing Reports from Favorite Services, and selecting "Balance & Fees"
- ❑ Clicking on the "Fee Details" icon allows users to access fee information
- ❑ Full-Service cumulative % is displayed, so mailers will know their standing (% Full-Service, fee expiration date, status of fee, etc.)
 - This will assist mailers to continue qualifying for the fee waiver by keeping their Full-Service cumulative at 90% or greater, during the fee waiver period

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Now let's look at where this new cumulative percentage will display.

The BCG has a Balance and Fees Report within the "Mailing Reports" module allowing mailers to view the Full-Service cumulative percent.

Mailers can access this report by clicking "Mailing Reports" from their favorites panel or from the Mailing Services tab, and then clicking "Balance and Fees" as shown here. Mailers can pick the permits for which they would like detailed information. Clicking on the "Fee Details" icon will allow them to access the fee information, which includes their fee amounts, current fee status, and fee types.

The Full-Service cumulative percentage is displayed, so mailers will know their Full-Service percent, fee expiration date and status of fee. This will assist mailers to continue qualifying for the fee waiver by keeping their Full-Service cumulative at 90 percent or greater, during the fee waiver period.

Agenda

- ❑ Full-Service Initiative Background
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-  **Full-Service and Fee Renewals**
- ❑ Service Performance Measurement (SPM) on the Mailer Scorecard

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The next topic we will discuss is Full-Service and Fee Renewals.

Full-Service and Fee Renewals

Permit and CAPS Renewal Letter Updates

- ❑ Mailers receive fee renewal letters in the mail 60 days prior to expiration
- ❑ With January enhancements, *PostalOne!* will include the following data into the template:
 - New disclaimer will inform mailers with Full-Service cumulative % of 90% or > that they do not have to pay fees if they meet the 90% or > threshold
 - Asterisks signal fees that qualify for the Full-Service waiver

UNITED STATES
POSTAL SERVICE
CAPS FEE RENEWAL LETTER
DECEMBER 2, 2014

CAPS SERVICE CENTER
UNITED STATES POSTAL SERVICE
2705 CAMPUS DRIVE
SAN RAFAEL CA 94977-9433

* Fee payment is deferred as long as mailings are presented as Full Service and maintains a threshold of 90%.

CUSTOMER 10484
ATTN: JANE DOE 10484
14505 N. RIVERSIDE DR
NEW BERLIN WI 53151-2225

Dear JANE DOE 10484,

In accordance with your CAPS application, we will be deducting the following fees from your Centralized Account Processing System (CAPS) Account # 10484. These fees will expire between 11/01/14 and 11/02/14, and must be paid through CAPS at this time.

EXPIRATION DATE	FEE TYPE	OFFICE NAME	PERMIT NUMBER	FEE AMOUNT	DO NOT PAY FEE
11/12/14	Standard Mail*	FENAUKEE, WI	878	\$220.00	

NOTE The auto-fee deduction feature will be blocked for CAPS mailers whose Full-Service cumulative percentage was at 90% or > on the day before the fee anniversary date.

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Mailers receive a fee renewal letter in the mail 60 days prior to the fee or waiver expiration date informing them of the renewal process, when fees are due, and price changes that may impact fee payment.

With the January 2015 enhancements, a new disclaimer will inform Full-Service mailers with a cumulative percentage of at least 90 that they do not have to pay fees if they maintain the threshold. This information is notated by the red box on the sample fee renewal letter shown here. The January enhancements will also provide fee notation asterisks signaling fees that qualify for the Full-Service waiver. This is notated in the black box on the sample renewal letter. These changes apply to all renewal letters, both CAPS accounts and non-CAPS accounts.

As previously mentioned, if a CAPS mailer maintains a Full-Service cumulative percent of at least 90 on the fee anniversary date, the CAPS auto fee renewal will not be triggered. This will ensure that Full-Service mailers are not automatically charged for fees that should be waived. If however the first mailing after the fee anniversary date, which sets the beginning of the new cumulative percentage, is below 90 the fee will be triggered.

Full-Service mailers can notify the CAPS service center to remove the auto fee renewal from their account.

These renewal notices will also include information regarding upcoming price changes that will affect fee payment. Let's talk a little more about this.

Full-Service and Fee Renewals

Fee Renewals – Scenario 1

- ❑ Current date is November 1st, 2014, there is a fee change occurring on November 15th, 2014
 - When fee is due on December 13th, 2014, the permit expires

NOTICE: The fee amount due is changing on Nov 15, 2014. A mailer who is within the last 60 days of the current service period can still pay the current price. However, fees paid after Nov 15, 2014 will require payment of the new fee. Please call your post office for the new fee amount or visit <http://pe.usps.gov>.

Dear SANTI:

Your privilege to mail at presorted rate(s) will expire on the dates shown below. If you plan to continue using your existing privilege(s), the fee(s) noted below must be paid prior to the indicated due date(s).

Permit No	Permit Type	Fee Type	Fee Amount	Expiration Date
81	PI	First-Class Presort*		Dec 13, 2014
81	PI	BPM Destination Entry*		Dec 13, 2014
81	PI	Parcel Select		Dec 13, 2014
81	PI	Presorted Library Mail		Dec 13, 2014
81	PI	Standard Mail		Dec 13, 2014
81	PI	Media Mail Presort		Dec 13, 2014

* Fee payment is deferred as long as mailings are presented as Full Service and maintains a threshold of 90%.

If you have paid the fee(s) shown above, please disregard this notice. It is recommended that fees be paid in advance to facilitate the acceptance of your mailings. Fee payments may be paid up to 60 days in advance of their expiration date. Please return this notice with your payment to the address below:

Notice to mailer that fee amount is changing before the expiration date and that mailers can pay the current rate if they pay before the price change date

Mailer has permit expiring within 60 days and after the price change

Fee Amount not shown since there is a price change (November 15th) before the expiration date (December 13th) – mailer must obtain fee amount from Postal Explorer

To demonstrate the new functionality regarding fee price changes, we will walk through two examples.

In the first scenario, the current date is November 1st, 2014, and there is a fee change occurring on November 15th, 2014. This mailer's permits expire on December 13th, 2014, which is both within 60 days of the current date and also after the price change will occur. The permit expires on the date that the fee is due, also known as the fee anniversary date.

Since *PostalOne!* may not know what the new fee amount will be at the time of letter issuance, the letter is generated without any fee amounts. The letter would include a notice of the upcoming fee change, as notated in blue. This notice explains that mailers can still pay the old fee amount if they pay before the price change date, and that if they pay after the price change date they would be subject to the new fee price. Mailers are instructed to go to Postal Explorer to get the fee amount for the new fees.

There is a disclaimer that the fee payment can be waived as long as mailings are presented as Full-Service and maintain a threshold of at least 90%. Items that currently have a cumulative Full-Service threshold of at least 90% are notated with asterisks under "Fee Type."

Full-Service and Fee Renewals

Fee Renewals – Scenario 2

- Current date is November 1st, 2014, there is a fee change occurring on November 15th, 2014
 - Fee Amount is shown since fee is due on October 23rd, 2014 which is before the fee change

Dear SOMEONE NEW:
Your privilege to mail at presorted rate(s) will expire on the dates shown below. If you plan to continue using your existing privilege(s), the fee(s) noted below must be paid prior to the indicated due date(s).

Permit No	Permit Type	Fee Type	Fee Amount	Expiration Date
281	PI	Media Mail Presort	200.00	Oct 23, 2014
281	PI	Presorted Library Mail	200.00	Oct 23, 2014
281	PI	Parcel Select	200.00	Oct 23, 2014
281	PI	BPM Destination Entry*	200.00	Oct 23, 2014
281	PI	Standard Mail*	200.00	Oct 23, 2014

* Fee payment is deferred as long as mailings are presented as Full Service and maintains a threshold of 90%.

If you have paid the fee(s) shown above, please disregard this notice. It is recommended that fees be paid in advance to facilitate the acceptance of your mailings. Fee payments may be paid up to 60 days in advance of their expiration date. Please return this notice with your payment to the address below:

Mailer's permit expires before the price change

Fee Amount shown since there are no price changes before the expiration date for fees expiring within 60 days – November 15th 2014 price change occurs after October 23rd, 2014


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In this next example, the current date is still November 1st and there is also a fee change occurring on November 15th, 2014.

This mailer has permits expiring on October 23rd, 2014, which is before the price change date on November 15th, 2014. The fee amounts are shown here since the fee amounts would not change before the expiration date on October 23rd, 2014.

As previously mentioned there is also a disclaimer on both letters that the fee payment can be deferred as long as mailings are presented as Full-Service and maintain a threshold of at least 90%. Items that currently have a cumulative Full-Service threshold of at least 90% are notated with asterisks under "Fee Type."

Agenda

- ❑ Full-Service Initiative Background
- ❑ Mailer Scorecard Electronic Verification Tab Updates
 - Full-Service Total Additional Postage Due Display
 - Full-Service Postage Assessments
 - Move Update Changes
 - eDoc Nesting/Sorting Validation
- ❑ Full-Service Cumulative Percent Display
- ❑ Full-Service and Fee Renewals
-  **Service Performance Measurement (SPM) on the Mailer Scorecard**

The next update we will talk about is the addition of Service Performance Measurement (SPM) exclusions to the Mailer Scorecard.

SPM on the Mailer Scorecard

Service Performance Measurement

- ❑ SPM measures USPS performance of First-Class Mail (includes Priority Mail and Priority Mail Express), Standard Mail, Periodicals, and Parcel Select, from induction through delivery
- ❑ Enhancements to the Mailer Scorecard
 - SPM data will be located in a separate tab on the existing Mailer Scorecard
 - Specific information shows reasons for exclusion of Full-Service mailings from SPM
 - Exclusions are caused by operational events as well as eDoc information provided by the mailer
- ❑ End goal: Increase visibility for these SPM exclusions so that mailers can monitor and address performance issues related to them.

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Service Performance Measurement (SPM) is a program that measures USPS performance of Priority Mail Express, Priority Mail, First-Class Mail, Standard Mail, Periodicals and Parcel Select mail as they flow through the USPS mail stream. SPM begins with mail induction and ends with final delivery.

As a reminder, the Mailer Scorecard is used by BME employees and mailers to review the summary of Full-Service, eInduction and Seamless mailing performance.

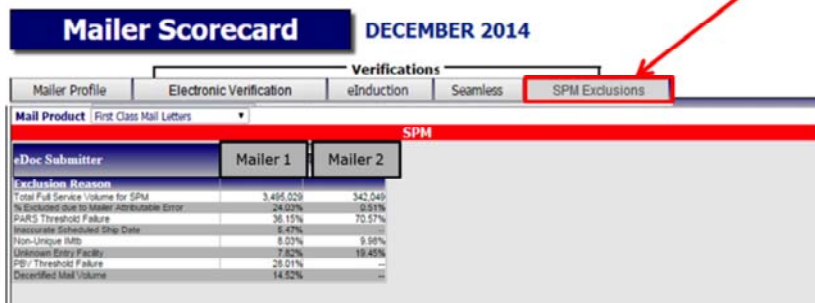
With this release, enhancements will be made to the Mailer Scorecard to provide mailers more visibility into eDoc and mail preparation issues that cause mail to be excluded from Service Performance Measurement, or SPM.

The SPM data will be located in a separate tab on the existing Mailer Scorecard. Specific information shows reasons for exclusion of Full-Service mailings from SPM. Exclusions are caused by both operational events (such as scans and appointments) as well as the eDoc information provided by the mailer.

The end goal is to increase visibility for these SPM exclusions so that mailers can monitor and address performance issues related to them.

SPM on the Mailer Scorecard

- New tab titled “SPM Exclusions” created to the right of the Seamless tab
- Available on Mailer Scorecard (eDoc Submitter) report only
- Data on tab will be based on Mailer Scorecard month and eDoc Submitter prompt selections



Mailer Scorecard		DECEMBER 2014	
		Verifications	
		Electronic Verification	eInduction
		Seamless	SPM Exclusions
Mail Product: First Class Mail Letters			
eDoc Submitter	Mailer 1	Mailer 2	SPM
Exclusion Reason			
Total Full Service Volume for SPM	3,495,029	342,049	
% Excluded due to Mailer Administrative Error	24.02%	9.81%	
PARS Threshold Failure	36.15%	70.57%	
Inaccurate Scheduled Ship Date	8.47%	---	
Non-Unique Mtb	8.03%	9.96%	
Unassigned Entry Failure	7.62%	19.40%	
PB / Threshold Failure	26.01%	---	
Decertified Mail Volume	14.52%	---	

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Now we will walk through the Mailer Scorecard itself to view and discuss the change.

In January 2015, a new tab titled “SPM Exclusions” will be visible to the right of the Seamless tab. It will be available on the Mailer Scorecard (eDoc Submitter) report only. Data on the SPM Exclusions tab will be based on Mailer Scorecard month and eDoc Submitter prompt selections.

SPM on the Mailer Scorecard

- The SPM Exclusions tab has a filter for Mail Product
 - The Mail Products that are available in the drop-down list are determined by the Month and Mailer CRID(s) that are selected
 - Data is updated weekly on this tab, therefore, the list could vary weekly for the same prompts that are selected
 - Possible Mail Products to appear on the drop-down menu include:
 - Periodicals Flats
 - First-Class Mail Letters
 - First-Class Mail Flats
 - Standard Letters
 - Standard Flats

Mailer Scorecard **DECEMBER 2014**

Verifications: Mailer Profile, Electronic Verification, eInduction, Seamless, **SPM Exclusions**

Mail Product: **First Class Mail Letters** (dropdown menu)

SPM Exclusions

Exclusion Reason	Mailer 1	Mailer 2
Total Paid Service Volume for SPM	3,495,029	342,049
% Excluded due to Mailer Attributable Error	24.03%	0.81%
Paid Threshold Failure	36.15%	70.57%
Inaccurate Scheduled Ship Date	5.47%	0.00%
Non-Unique IDs	0.03%	0.90%
Unusable Entry Facility	7.65%	19.40%
PIV Threshold Failure	28.01%	...
Decomposed Mail Volume	14.52%	...

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The SPM Exclusions tab has a filter for Mail Product as indicated by the red box shown here. To access the filter dropdown, click on the triangle to the right of the Mail Products field. The mail products that appear in the drop-down list are determined by the products that were excluded from SPM during the month for which the scorecard report has been run.

Data is updated weekly on this tab; therefore, the list could vary weekly for the same prompts that are selected. Possible mail products to appear on the drop-down menu list include:

- Periodicals Flats
- First Class Mail Letters
- First Class Mail Flats
- Standard Letters
- Standard Flats

SPM on the Mailer Scorecard

- “Total Full-Service Volume for SPM” is available on the first row of the SPM tab

Mailer Scorecard DECEMBER 2014

Execution Time: 11/18

Mail Product: First Class Mail Letters

Verifications: eInduction Seamless SPM Exclusions

eDoc Submitter: Mailer 1 Mailer 2

SPM

Exclusion Reason

Exclusion Reason	Mailer 1	Mailer 2	SPM
Total Full Service Volume for SPM	3,495,029	342,049	298,948
% Excluded due to Mailer Attributable Error	24.03%	0.51%	
Back S Threshold Failure			
Malfunction Scheduled Ship Date			
From Unique ID	7.82%	19.40%	
Unknown Entry Point			
ZIP Threshold Failure			
Declined Mail Volume			

Tooltips appear when you hover over a column or row header to explain the metric

“Total Full-Service Volume for SPM” is available on the first row of the SPM Exclusions tab. As long as there is data to report for product during the month selected, then “Total Full-Service Volume for SPM” and “% Excluded Due to Mailer Attributable Error” will always display on the tab.

The data on this tab is related to Full-Service mailings and is gathered from multiple sources, including eDoc, sampling, and mail processing equipment. This data is what feeds the exclusion reasons that are shown on the tab.

Note that hovering the mouse over any of the row headers will display a tool tip definition of that line item. We will show you these definitions on the next two slides.

SPM on the Mailer Scorecard

- List of eDoc preparation SPM exclusions
 - No drill down or error detail reports currently available

eDoc Preparation	SPM Exclusion Reason	Tooltip Description
eDoc Preparation	Incorrect Entry Facility	The scheduled appointment facility and the actual entry facility was not the same.
eDoc Preparation	Non-Unique IMb	Non-unique IMb.
eDoc Preparation	Invalid Entry Point for Discount Claimed	Invalid entry point discount claimed for the ZIP code provided in the eDoc.
eDoc Preparation	Inaccurate Scheduled Ship Date	eDoc Scheduled Ship Date is 2 or more days prior to the date the Postage Statement was finalized.
eDoc Preparation	Non-Unique IMtb	Non-unique IMtb or default IMtb.
eDoc Preparation	Orphan Handling Unit	Orphan tray is not BMEU entered. Orphan trays can only be BMEU entered in order to be included in measurement.
eDoc Preparation	Non-Unique IMcb	Non-unique 99M Container Barcode.
eDoc Preparation	Invalid Delivery Point	Invalid delivery ZIP code.
eDoc Preparation	Unknown Entry Facility	The entry facility provided in the eDoc is unknown.
eDoc Preparation	Invalid Origin ZIP5	Entry point 5 digit ZIP Code does not match to a valid Area or District.
eDoc Preparation	Invalid Start-the-Clock Date	Start-the-Clock date is 120 days or more before the current date.
eDoc Preparation	Destination Entered FCM	First Class Mail was identified as Destination entered in the eDoc.
eDoc Preparation	Invalid Container Level for Entry	Destination Flats Sequencing System (DFSS) container entered at non-FSS sites
eDoc Preparation	Incorrect Appointment	Non-matching Appointments between the eDoc and the Surface Visibility (SV) unload scans associated Appointment.

A mailpiece can be excluded from measurement due to one or more issues. This table shows the possible preparation errors as found in the eDoc that may appear on the SPM Exclusions tab, as well as their definitions. Remember these definitions will display on the screen if you hover over an exclusion reason.

As mentioned, these exclusion reasons appear on the SPM Exclusions tab based on the data that is available from the mailings for the Mail Product and Month for which the scorecard was run. In other trainings related to the mailer scorecard, drill down reports on errors were discussed. Note that there are no drill down or detail reports available at this time for further error investigation on the SPM Exclusions tab.

SPM Exclusion Reasons include:

- Incorrect Entry Facility
- Non-Unique Intelligent Mail Barcode (IMb)
- Invalid Entry Point for Discount Claimed
- Inaccurate Scheduled Ship Date
- Non-Unique Intelligent Mail Tray Barcode (IMtb)
- Orphan Handling Unit
- Non-Unique Intelligent Mail Container Barcode (IMcb)
- Invalid Delivery Point
- Unknown Entry Facility
- Invalid Origin ZIP5
- Invalid Start-the-Clock Date
- Destination Entered First-Class Mail (FCM)
- Invalid Container Level for Entry
- Incorrect Appointment

SPM on the Mailer Scorecard

- Continuation of SPM exclusions

Mail Preparation or N/A	SPM Exclusion Reason	Tooltip Description
Mail Preparation	PARS Threshold Failure	Mail redirected or identified as undeliverable by PARS (Postal Automated Redirection System).
Mail Preparation	FAST Appointment Irregularity	The associated Appointment has irregularities identified in the Facility Access Shipping and Tracking (FAST) system.
Mail Preparation	Non-Unique Physical IMcb	The 99M Container Barcode had multiple Surface Visibility (SV) unload scans on different Appointments.
Mail Preparation	PBV Threshold Failure	Mail did not pass performance based verifications (PBV).
Mail Preparation	Broken Pallet	SV identified the Container to be a broken pallet.
Mail Preparation	Inaccurate eDoc Nesting	Nesting discrepancies in mail preparation between the FS IMD sample scan and eDoc.
Mail Preparation	Container Overflow	Flats overflow volume from one logical or physical tray to another that's not in the same Logical/Physical Container.
N/A	Total Full Service Volume for SPM	Total pieces of Full Service mailing
N/A	% Excluded due to Mailer Attributable Error	Percentage of mail excluded from Service Performance Measurement due to eDoc or mail preparation issues.
N/A	Decertified Mail Volume	Mail is excluded from measurement due to a request to be out of measurement due to mailer issues.

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This is a continuation of the list of possible SPM exclusion reasons that will show up on the SPM tab, and their definitions. Exclusion reasons in this table are related to mail preparation and other non-eDoc preparation issues.

SPM Exclusion Reasons, continued:

Postal Automated Redirection System (PARS) Threshold Failure

Facility Access Shipping and Tracking (FAST) Appointment Irregularity

Non-Unique Physical IMcb

Performance Based Verification (PBV) Threshold Failure

Broken Pallet

Inaccurate eDoc Nesting

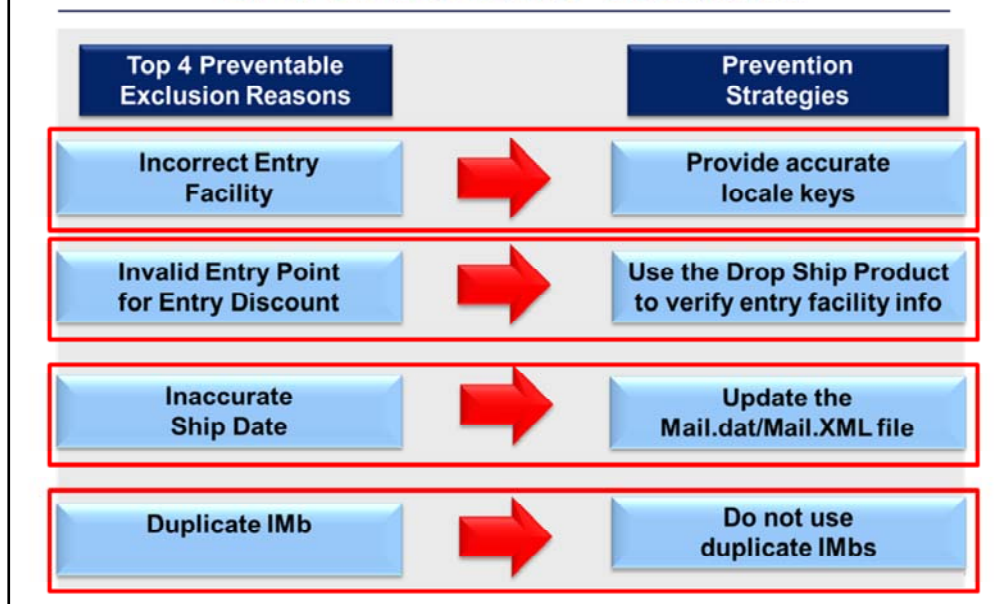
Container Overflow

Total Full-Service Volume for SPM

% Excluded due to Mailer Attributable Error

Decertified Mail Volume

SPM on the Mailer Scorecard



Now that we've reviewed all of the possible exclusion reasons that can show up on the mailer scorecard, let's discuss the top four SPM exclusions that mailers see on the scorecard and how these exclusions can be prevented.

The first exclusion is Incorrect Entry Facility. Mail is excluded from Service Measurement when the entry facility (locale key or postal code) in the eDoc provided by the mailer does not match the facility specified in the associated FAST appointment for a container. This error applies to mailer transported mail being taken to sites where FAST appointments are not able to be made. To prevent this from occurring, mailers should make sure the locale key is accurate and matches the location where entering the mail and making an appointment. Mailers should not make appointments at the local Sectional Center Facility if entering mail directly at the Surface Transfer Center or Air Facility.

Invalid Entry Point for Entry Discount is the second exclusion we will discuss. Mail is excluded from Service Measurement when the entry discount claimed in the eDoc is invalid at the entry facility identified in the eDoc for drop-ship mail. The recommended prevention strategy for this exclusion is to verify entry facility information using the MDF lookup tool at fast.usps.com. Mailers using vendor-provided or custom mailing software should also check the MDF reference data used by the mailing software for out-of-date versions or corrupted data.

Now let's review the Inaccurate Ship Date exclusion. Mail is excluded from Service Measurement when the scheduled ship date is more than 48 hours before the postage statement finalization date/time and the container does not receive a scan when it arrives at the USPS facility. If a mailer is populating the Scheduled Ship Date, it is recommended that the Mail.dat/Mail.XML file be updated with the correct ship date and time as mailing/logistics plans change.

And finally, the Duplicate IMb exclusion. Mail is excluded from Service Measurement when the barcode on the mailpiece is not unique within 45 days. To avoid this exclusion, mailers should not use duplicate IMBs. Duplicate IMb numbers are identified on the mailer scorecard and USPS will contact mailers when the Duplicate IMb percentage exceeds a set threshold.

It is suggested that you keep this information handy to assist mailers should one of these exclusions arise.